From: Kathrine Muse[/O=EXCHANGELABS/OU=EXCHANGE ADMINISTRATIVE

GROUP

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Sent: Fri 1/27/2023 10:40:09 AM (UTC-05:00)

To: ML Clark[mclark@stratfs.com]; Ryan Sasson[rsasson@stratfs.com]; Salvatore

Tirabassi[stirabassi@stratfs.com]; Kimberly Celic[kim@stratfs.com]; Daniel Blumkin[dblum@stratfs.com]; Marc Lemberg[MLemberg@stratfs.com]

Subject: Law Firms Launching Late Q1/Early Q2

Attachment: Clear Creek Law Firm Rollup Plan.xlsx

Morning All -

We are just over 60 days out before launching Clear Creek, a multi state firm servicing under 35k clients. All pertinent documents & information related to the rollup including the project plan (attached) is housed in the New Law Firm Sharepoint folder for easy access. Marc & I also worked on a RACI chart for this iterative process; over the course of the next week or so I'll reach out to you or your respective team members responsible and/or accountable to some of these items.

There will be a fast follow to launch the Brandon Ellis Law Firm, which will service Ohio. We have yet to receive any other details around servicing entity assignment or processor, but stakeholders will be kept informed. Please reach out with any questions/needs. Thanks, have a great weekend. Katie

Kathrine Muse

Product Strategist

O: (646) 214-0430 //ext 4420 //**E:** kmuse@stratfs.com

Clear Creek Go Live Tent 3/27/23 GH

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System	Pass/Fail	User Action
Salesforce		Payment Ledger (Fee accurac by type) Sync to NDS, Docs visible & consistent, Portfolio, Payment Processing, ledger syncing with processor
		Doc generation, matching fee schedule with NDS, correct
Velocify		service fee %
Credit Puller		PreLaunch Test
Touchpoint sync		graphics, sliders, program quotes
		PreLaunch Test, Post Launch monitor enrollment and
GH/RAM sync		reporting
Fee Templates		PreLaunch Test, reconciliation between Velocify, NDS, SF
		Payment schedule syncing, drafts dates accurate, contracts
Middelware/NDS		mirrored, notary signed, emails updated
Gensys (auto compliance)		PreLaunch Test
Exela Dcoument Validation		Post Launch monitoring
Portal		U/PW receipt, sync accuracy, UI and navigation
		Unsubscribe landing page testing, review for 404s or loading
Website Pages		errors across all browsers
Phone/Email/Fax queues		PreLaunch Test
Successful delivery marketing cloud emails		PreLaunch Test
		Post Launch, monitor enrollment and reporting, Cam to
1st Payment/Draft Conversion		reconcile fees collected by portfolio, monthly reconciliation

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Workflow/Lucid Chart
Controls Reports (Upcoming Drafts, Expected Fees by LF)
Post Mortum
Validation/Controls by
NDS Testing
PDF Contract fee structure is different than NDS

Open Items/WWW

Future State Open Items
Katie - centralized location for manifest, graphics, checklists
Katie - testing processors - controls for payments
Katie - Sales commission reports working properly

Project Tasks	Project Owner	Design/Branding	Content Creation	Accounting	Legal	Product	Law Firm	GC	HR/People	Versara	Sales Ops	Product	Service Ops	Neg Ops	CR	Strategy	IT	CLAs	Finance	CEO
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